PYMIDOL (EMS)

USER MANUAL

TABLE OF CONTENTS

1. Installing the Application
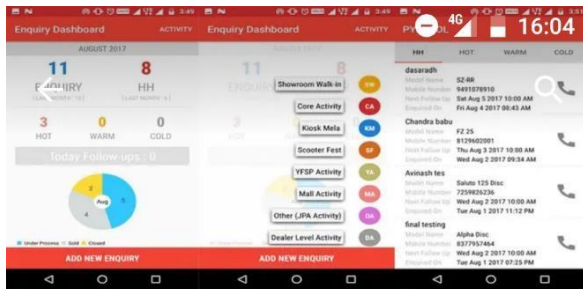
To find the App manually, navigate to the Google Play Store and search "**Pymidol**".

INSTALL

Select to begin the download

DOWNLOAD AND INSTALL

Please wait while the Pymidol Mobile App is being downloaded and installed.
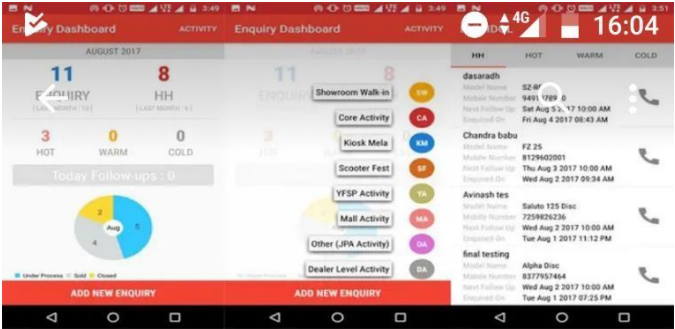
Pymidol
YMSLI
3+

| UNINSTALL | OPEN |

OPEN
Tap to start using the Pymidol Mobile App.

ICON
This shortcut icon will be displayed on the device screen.

2. Starting the application

2.1 LAUNCH SCREEN

When you start the application by tapping the Pymidol icon, The Launch screen appears.

2.2 LOGIN SCREEN

On opening the Pymidol App, you may be asked to Login. Please enter the correct USER ID and Password.

FORGOT PASSWORD
Navigates to **FORGOT PASSWORD** screen.
ONLY FOR SALES PERSON.

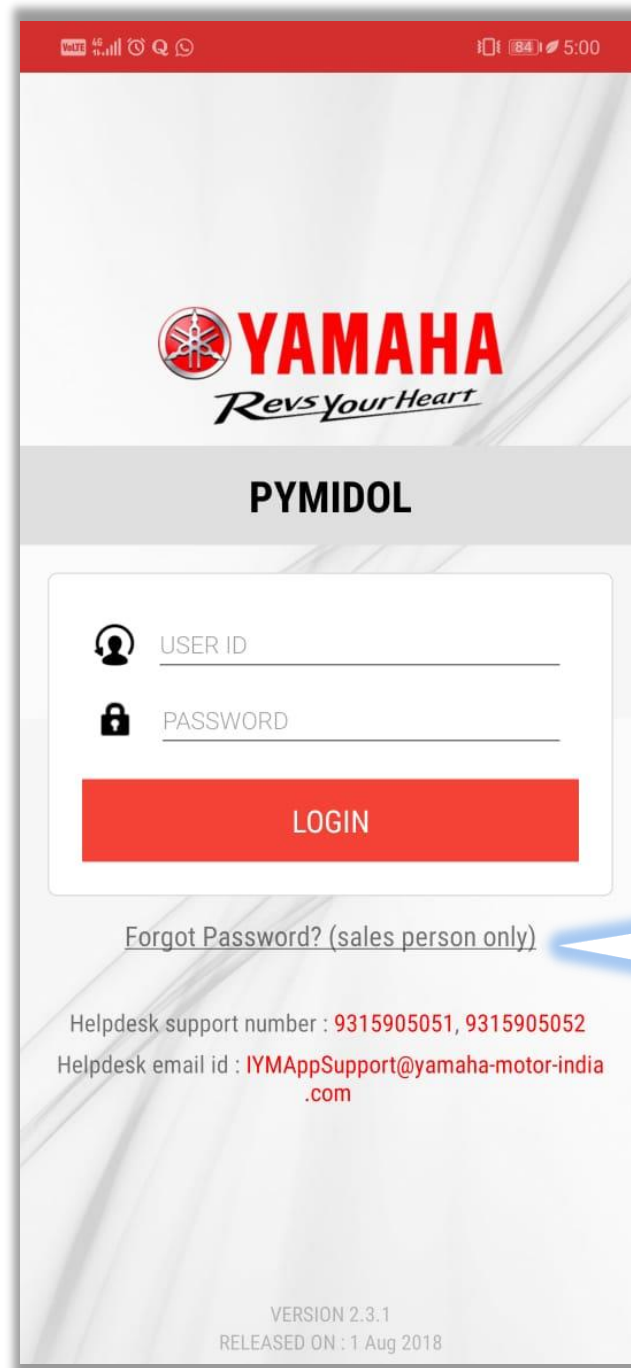| MESSAGE	DESCRIPTION	SOLUTION
Failed To Authenticate: USER ID	Appears when the user has entered invalid credentials.	Please check the credentials again.
Please enter the password	Appears when the user has not entered the password.	Please enter the password
Network Connection not available	Appears when there exists any problem with the user's internet connection.	Please check your internet connection
Server down	Appears when the application server is down.	Please contact application's technical and support department

2.3 FORGOT PASSWORD SCREEN

This screen allows the sales person (only) to reset his password in case he has forgotten the password.

2.4 SYNC SCREEN

This Screen appears after successful login or just after the launch screen (in case the user was already logged in). It synchronizes the app data with the latest data fetched from the API.

3. Home Screen

CHANGE PASSWORD
This button allows you to change your password. **ONLY FOR SALES PERSON.**

LOGOUT
This button allows you to log out of the application.

ENQUIRY
This button navigates you to the Enquiry Dashboard.

3.1 LOGOUT POPUP

OK
Logs you out of the application.

CANCEL
Cancels the logout action.

Do you want to logout?

CANCEL   OK
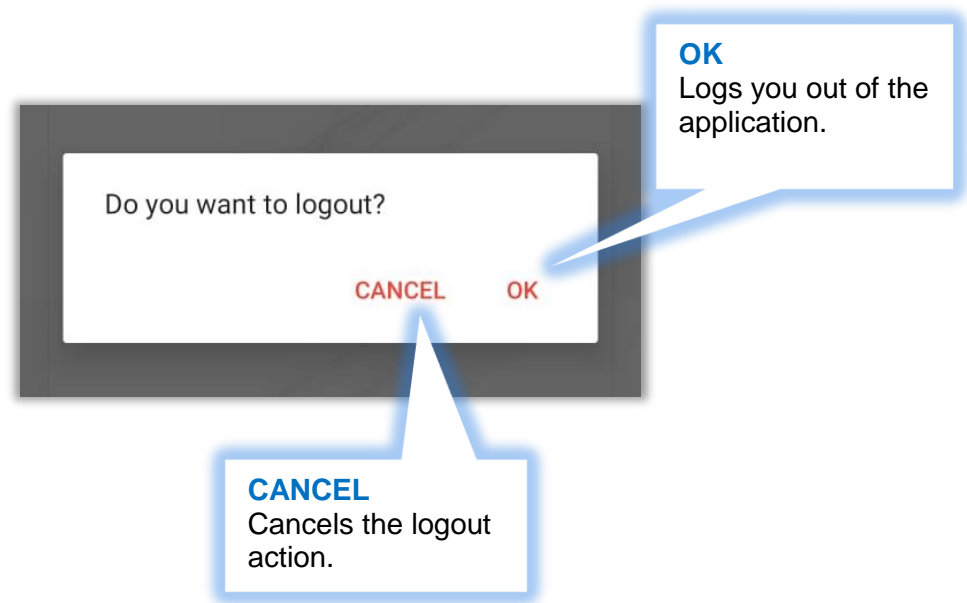
3.2 CHANGE PASSWORD SCREEN

Change Password

Current Password

Old password

New Password

New password

Confirm Password

Confirm password

CANCEL   UPDATE

New Password should be greater than 6 characters.

Re-enter new password for confirmation.

CANCEL
Cancels the action and returns to Home Screen.

UPDATE
Validates and Updates the password.

4. Sales Person Enquiry Dashboard

This Dashboard appears when the user has been logged in as **Sales Person**. The Dashboard has three tabs as follows:-

4.1 SUMMARY TAB

REFRESH
This button refreshes the displayed records to reflect any changes.

MONTH/DATE RANGE
Displays the selected Month/Date Range which can be changed either by using the surrounding arrow buttons or the Calendar button.

CALENDAR
This button opens up a calendar allowing you to select a date range.

DIGITAL
Displays the digital Lead Count for the selected month/date range. Navigates to **DIGITAL** Tab on Tap.

ENQUIRY
Displays the Enquiry Count. Navigates to **ENQUIRY** Tab on Tap.

TODAY'S FOLLOW-UPS
Displays the Total no. of enquiries (Digital+Normal) that need to be followed up today. Navigates to **TODAY'S FOLLOW-UPS** screen on click.
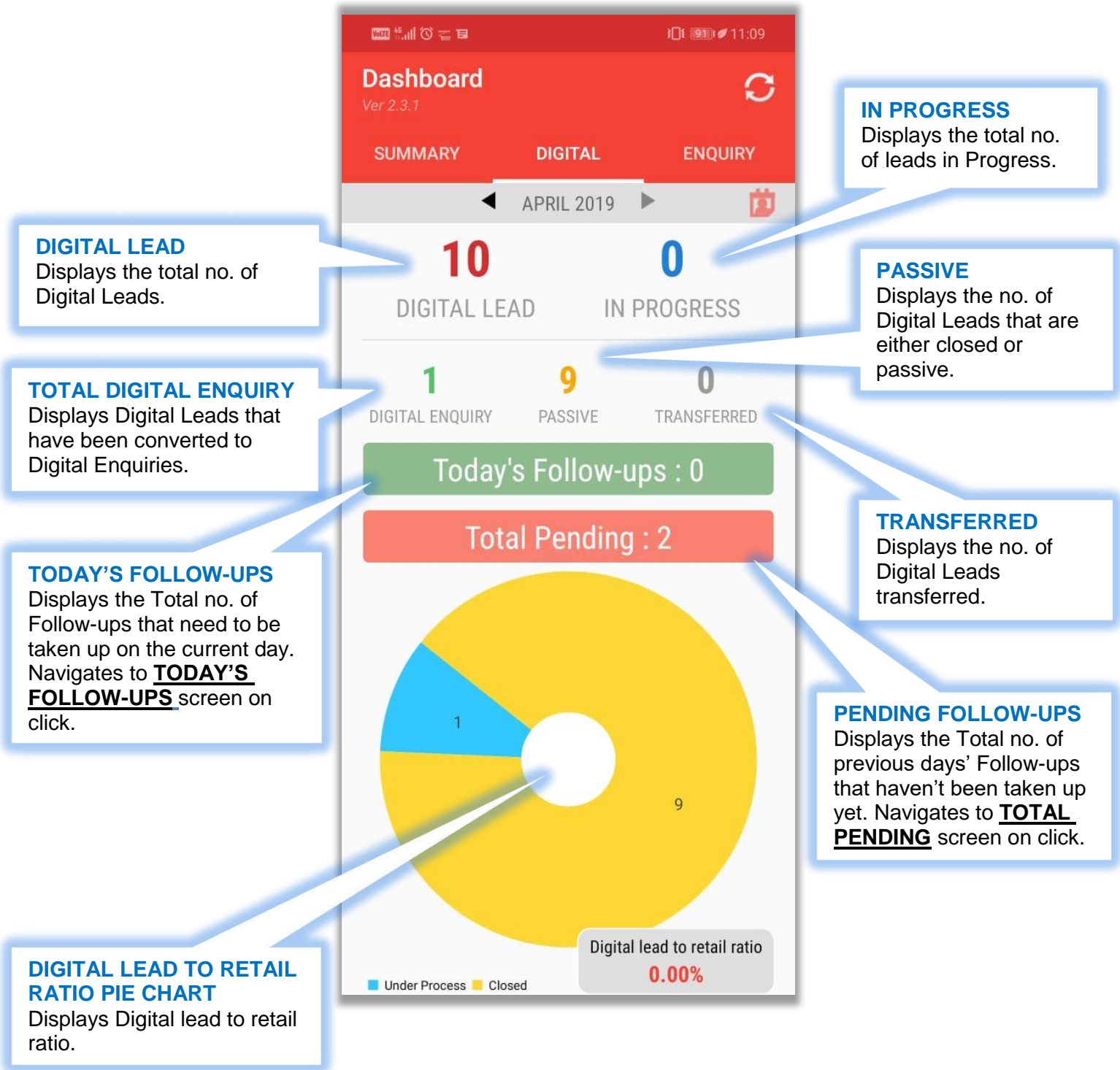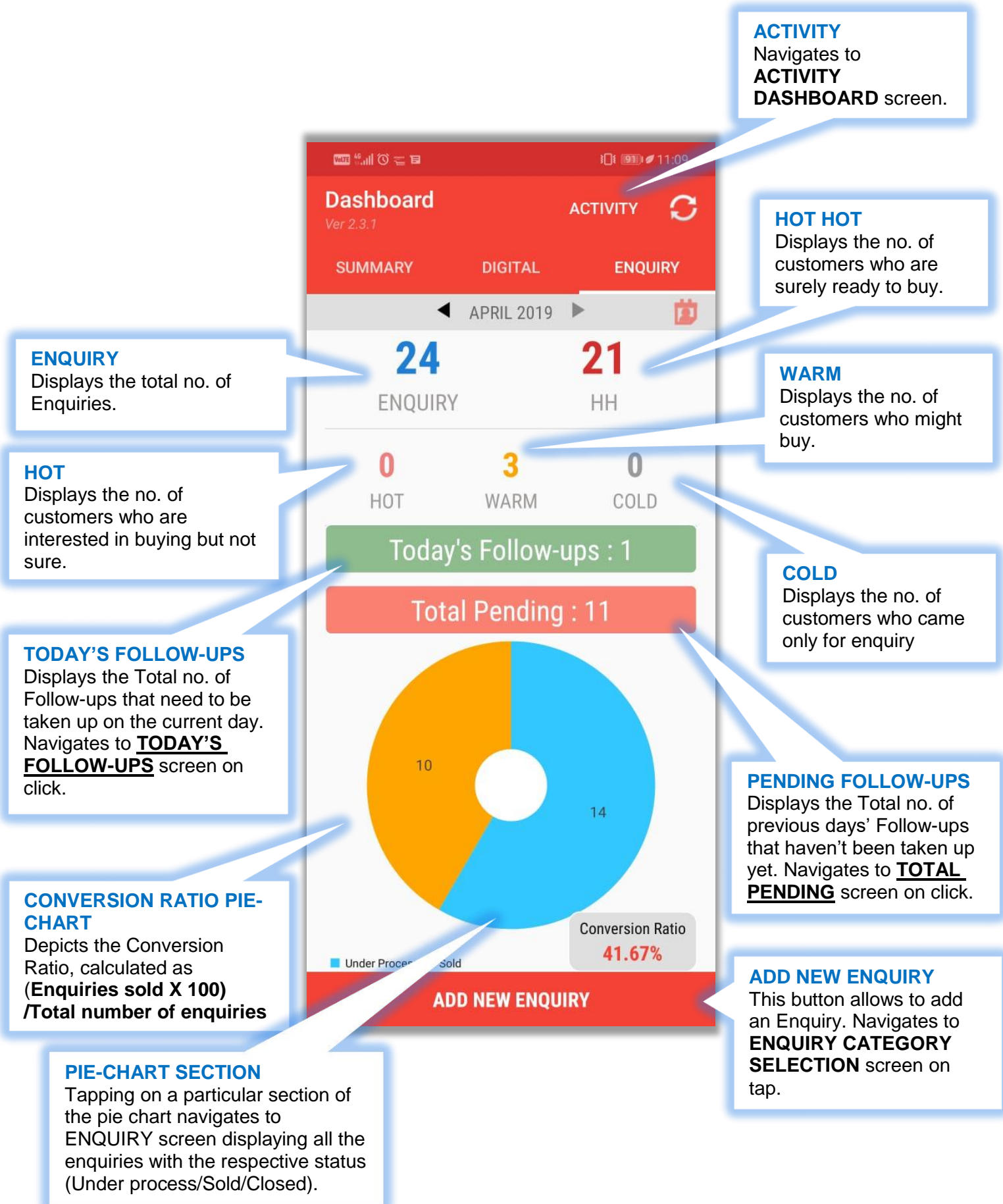
PENDING FOLLOW-UPS
Displays the Total no. of previous days' follow-ups that haven't been taken up yet. Navigates to **TOTAL PENDING** screen on click.

4.2 DIGITAL TAB

IN PROGRESS
Displays the total no. of leads in Progress.

DIGITAL LEAD
Displays the total no. of Digital Leads.

PASSIVE
Displays the no. of Digital Leads that are either closed or passive.

TOTAL DIGITAL ENQUIRY
Displays Digital Leads that have been converted to Digital Enquiries.

TRANSFERRED
Displays the no. of Digital Leads transferred.

TODAY'S FOLLOW-UPS
Displays the Total no. of Follow-ups that need to be taken up on the current day. Navigates to **TODAY'S FOLLOW-UPS** screen on click.

PENDING FOLLOW-UPS
Displays the Total no. of previous days' Follow-ups that haven't been taken up yet. Navigates to **TOTAL PENDING** screen on click.

DIGITAL LEAD TO RETAIL RATIO PIE CHART
Displays Digital lead to retail ratio.

App screenshot:

Dashboard
Ver 2.3.1

SUMMARY | DIGITAL | ENQUIRY

◀ APRIL 2019 ▶

10
DIGITAL LEAD

0
IN PROGRESS

1
DIGITAL ENQUIRY

9
PASSIVE

0
TRANSFERRED

Today's Follow-ups : 0

Total Pending : 2

Digital lead to retail ratio
0.00%

■ Under Process ■ Closed

4.3 ENQUIRY TAB

ACTIVITY
Navigates to **ACTIVITY DASHBOARD** screen.

HOT HOT
Displays the no. of customers who are surely ready to buy.

ENQUIRY
Displays the total no. of Enquiries.

WARM
Displays the no. of customers who might buy.

HOT
Displays the no. of customers who are interested in buying but not sure.

COLD
Displays the no. of customers who came only for enquiry

TODAY'S FOLLOW-UPS
Displays the Total no. of Follow-ups that need to be taken up on the current day. Navigates to **TODAY'S FOLLOW-UPS** screen on click.

PENDING FOLLOW-UPS
Displays the Total no. of previous days' Follow-ups that haven't been taken up yet. Navigates to **TOTAL PENDING** screen on click.

CONVERSION RATIO PIE-CHART
Depicts the Conversion Ratio, calculated as (**Enquiries sold X 100) /Total number of enquiries**

ADD NEW ENQUIRY
This button allows to add an Enquiry. Navigates to **ENQUIRY CATEGORY SELECTION** screen on tap.

PIE-CHART SECTION
Tapping on a particular section of the pie chart navigates to ENQUIRY screen displaying all the enquiries with the respective status (Under process/Sold/Closed).

Dashboard
Ver 2.3.1
ACTIVITY

SUMMARY   DIGITAL   ENQUIRY

◀ APRIL 2019 ▶

24   21
ENQUIRY   HH

0   3   0
HOT   WARM   COLD

Today's Follow-ups : 1

Total Pending : 11

10

14

Conversion Ratio
41.67%

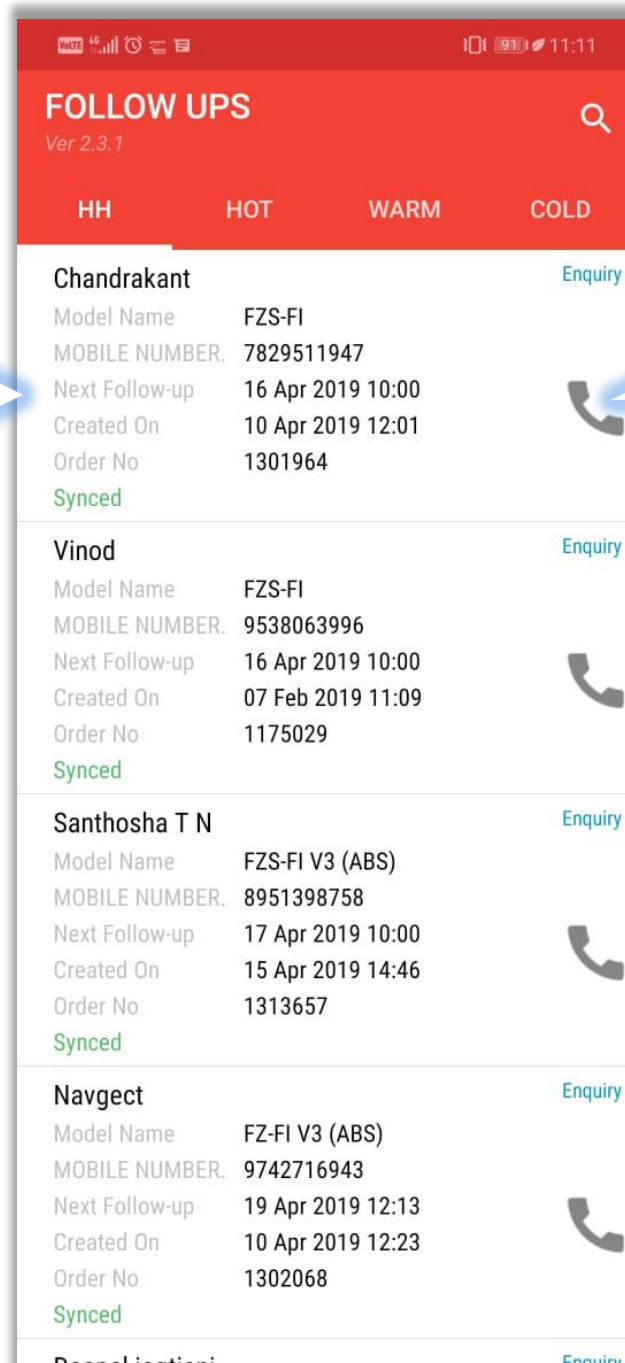■ Under Proces   Sold

ADD NEW ENQUIRY

4.4 **ACTIVITY DASHBOARD**

This screen shows the activity report of all the Enquiries source-wise such as SW: Showroom Walk-in, CA: Core Activity, KM: Kiosk Mela etc.

ENQUIRY
Displays the total no. of enquiries.

CA (CORE ACTIVITY)
Displays all the details of the enquiries obtained via Core Activity.

SW (SHOWROOM WALK-IN)
Displays all the details of the enquiries obtained via Showroom Walk-in.

KM (KIOSK MELA)
Displays all the details of the enquiries obtained via Kiosk Mela.

4.5 TODAY'S FOLLOW- UPS

This screen shows current day's follow-up enquiries.

ENQUIRY
Displays the Enquiry Details. Navigates to **UPDATE ENQUIRY** screen on tap.

CALL
This button makes a call to the respective Customer

4.5.1 UPDATE ENQUIRY

This screen will allow you to modify details of an enquiry.

CALL
This button makes a call to the respective Customer

UPDATE
This button allows you to update and save the changes made in the details of an enquiry

CANCEL
This button allows you to exit from update enquiry screen.

4.5.2 <u>UPDATE SCREEN AFTER CALL TO CUSTOMER</u>

After making a call, you need to update the enquiry by selecting the suitable status.
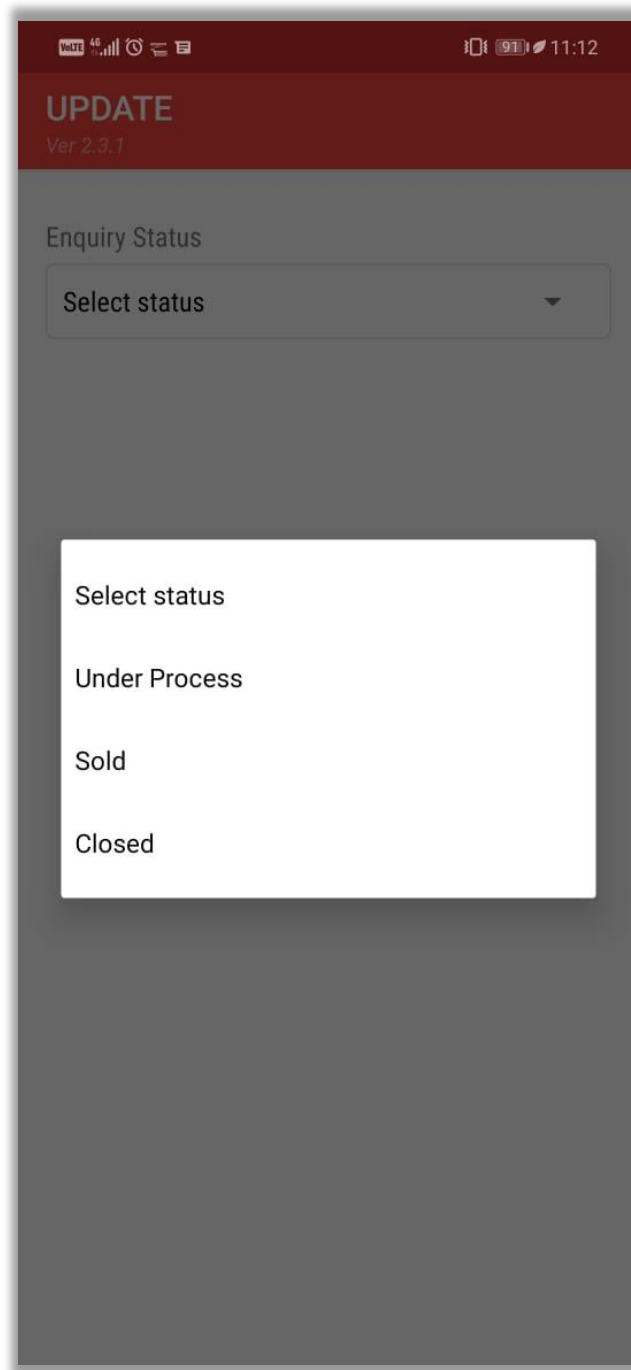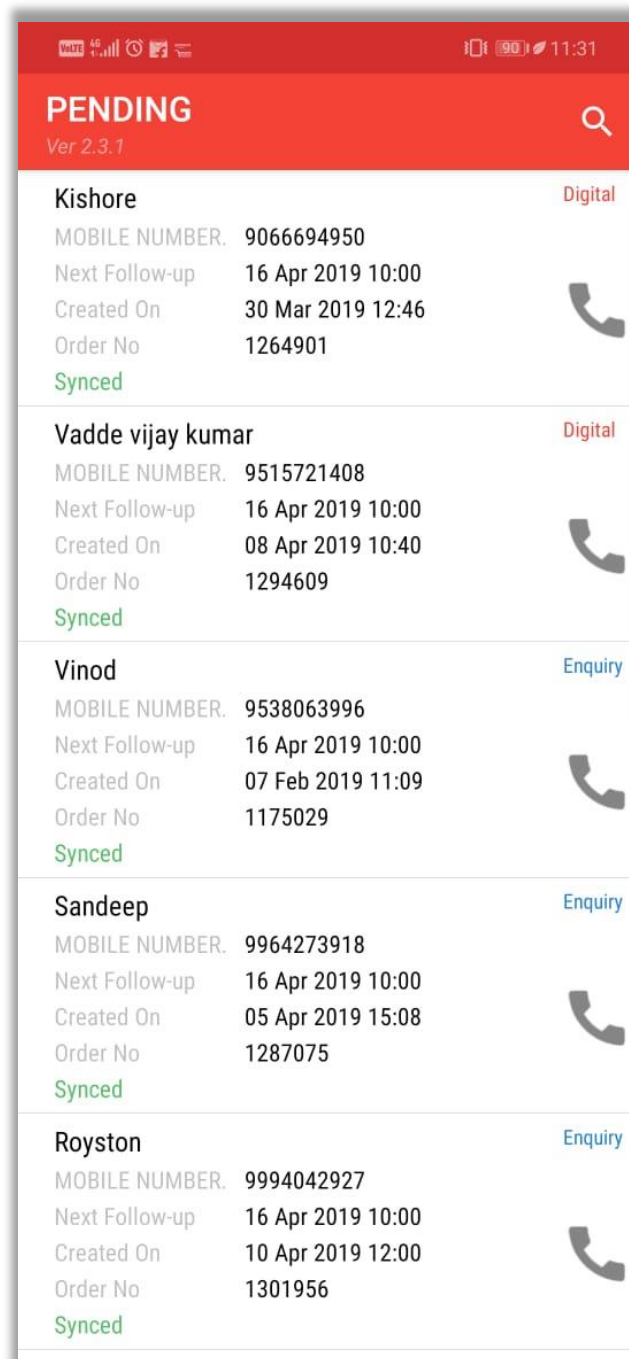
4.5.3 SUCCESS MESSAGE SCREEN FOR ENQUIRY UPDATION
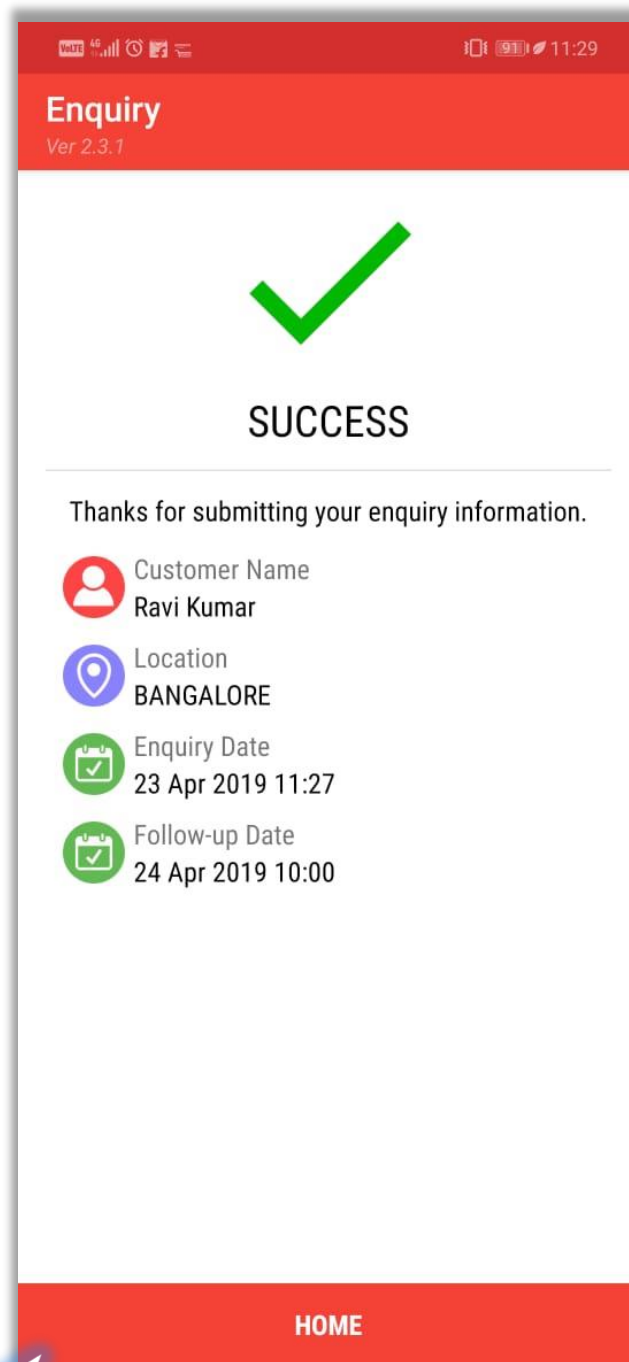
HOME
This button navigates to HOME SCREEN on tap.

4.6 TOTAL PENDING

This screen will show you details of pending enquiries that are yet to be followed-up.
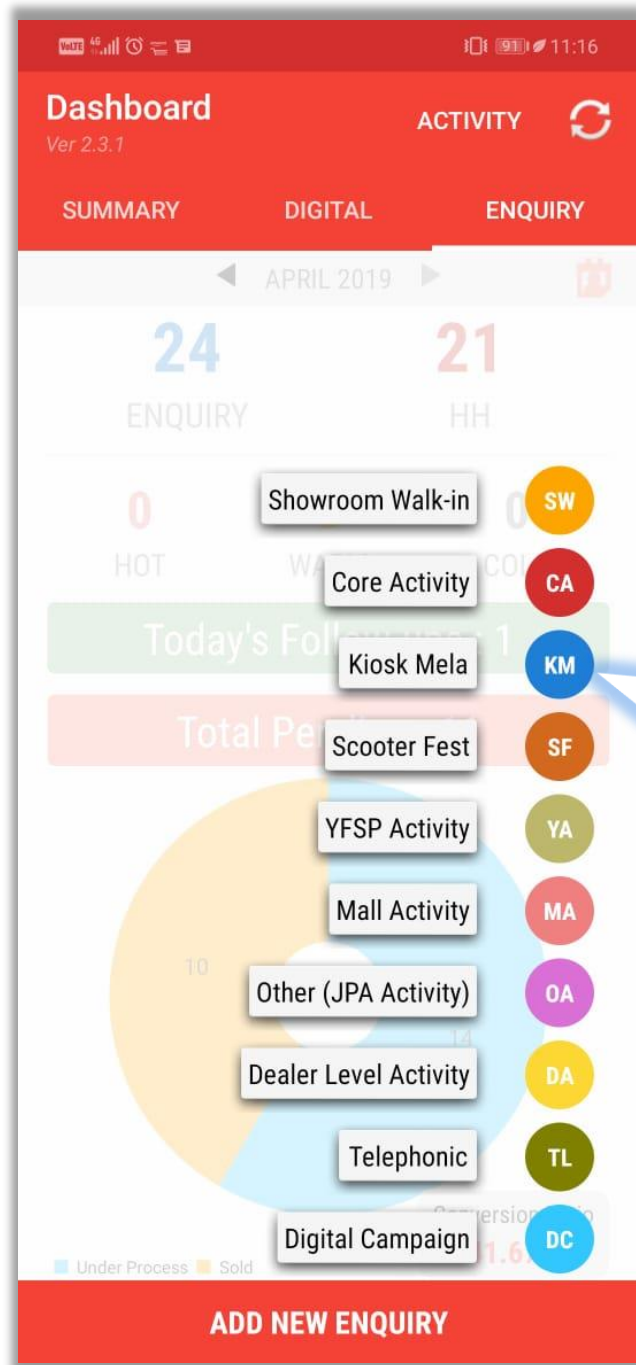
5. Add New Enquiry Screen

5.1 ENQUIRY CATEGORY SELECTION

This screen displays all Enquiries corresponding to the selected sales person.

ENQUIRY CATEGORY
Tapping on any one of the categories navigates to **DEALERS DETAILS SCREEN**

5.2 NEW ENQUIRY SCREEN

NEW ENQUIRY
Ver 2.3.1

Enter aadhar number

Payment Type

○ Cash ○ Finance

Enquiry Status

Select status ▼

Test Ride Taken

○ Yes ○ No

Customer's Current Model

Enter customer current model

Customer Type

○ N ○ Y ○ C

Customer Interested In Exchange

○ Yes ○ No

Remarks

Enter the remarks…

CANCEL | SAVE

SAVE
Saves the Enquiry if all the mandatory fields have been filled.

CANCEL
Cancels Enquiry Creation.

5.3 SUCCESS MESSAGE SCREEN

This screen shows that the enquiry has been successfully updated.
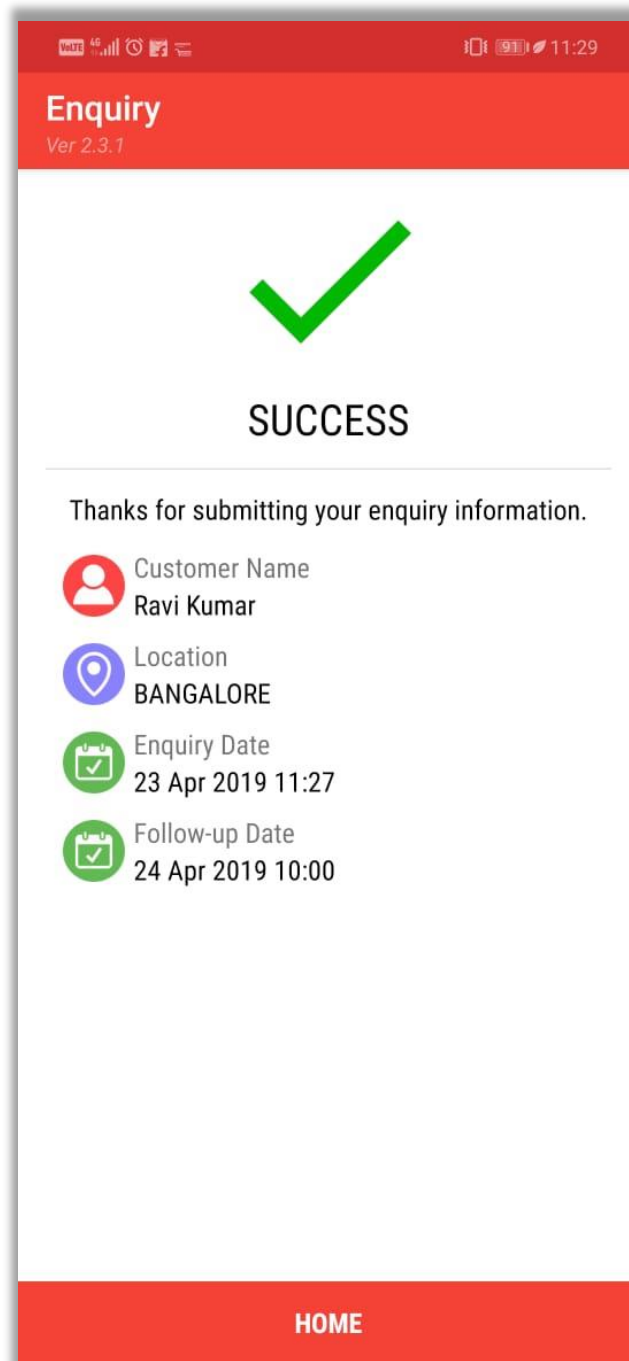
6. List of Enquiries Screen

This screen shows the list of Enquiries.

SEARCH
This button allows you to search for a particular enquiry.

UNDER PROCESS
Depicts that this enquiry in **under process** of converting into a sale.

SOLD
Depicts that this enquiry has been converted into a sale.

7. Dealer Enquiry Dashboard

This Dashboard appears when the user has been logged in as **Dealer**. The Dashboard has three tabs and displays all the counts as **the cumulative of all the manpower under the dealer** as follows:-

7.1 SUMMARY TAB

REFRESH
This button refreshes the displayed records to reflect any changes.

MONTH/DATE RANGE
Displays the selected Month/Date Range which can be changed either by using the surrounding arrow buttons or the **CALENDAR** button.

CALENDAR
This button opens up a calendar allowing you to select a date range.

Dealer Dashboard
Ver 2.3.1

SUMMARY   DIGITAL   ENQUIRY

◄ APRIL 2019 ►

258
DIGITAL

67
ENQUIRY

Today's Follow-ups : 11

Total Pending : 326

DIGITAL
Displays the digital Lead Count for the selected month/date range. Navigates to **DIGITAL TAB** on Tap.

ENQUIRY
Displays the Total Enquiry Count. Navigates to **ENQUIRY** Tab on Tap.

TODAY'S FOLLOW-UPS
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Displays the no. of Digital Leads transferred.

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Displays the Total no. of previous days' Follow-ups that haven't been taken up yet. Navigates to **TOTAL PENDING** screen on click.

DIGITAL LEAD TO RETAIL RATIO PIE CHART
Displays Digital lead to retail ratio.

7.3 ENQUIRY TAB

MANPOWER
Navigates to **DEALER MANPOWER** screen.

HOT HOT
Displays the no. of customers who are surely ready to buy.

WARM
Displays the no. of customers who might buy.

ENQUIRY
Displays the total no. of Enquiries.

HOT
Displays the no. of customers who are interested in buying but not sure.

COLD
Displays the no. of customers who came only for enquiry

TODAY'S FOLLOW-UPS
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Dealer Dashboard
Ver 2.3.1
MANPOWER

SUMMARY   DIGITAL   ENQUIRY

◄ APRIL 2019 ►

67
ENQUIRY

46
HH

2
HOT

9
WARM

10
COLD

Total Pending : 69

4

28

35

Conversion Ratio
41.79%

■ Under Process ■ Sold ■ Closed

7.4 DEALER MANPOWER

This screen shows the details of all the Sales Persons under the respective dealer.

DETAILS
Tapping on the name of any Sales Person navigates to **SALES PERSON STATUS** screen.

ENQUIRY STATUS TABLE
This table displays the Enquiry status of all the listed sales persons. The table is horizontally scrollable.

DEALER MANPOWER
Ver 2.3.1

Enquiry Status

NAME	TOTAL ENQUIRY	UNDER H	
		HH	H
AJMAL BASHA	28	12	1
SATHISH G	0	0	0
SHAIKH MOHAMMED SAQLAIN	14	0	0
SURESH BABU N S	25	6	0

Follow-up Status

NAME	PENDING	TODAY FO
AJMAL BASHA	9	6
SATHISH G	0	0
SHAIKH MOHAMMED SAQLAIN	39	3
SURESH BABU N S	17	0

FOLLOW-UP STATUS TABLE
This table displays the Follow-up status of all the listed sales persons. The table is horizontally

7.5 SALES PERSON STATUS

This screen shows the overall status of the respective sales person.